



Regions Branding. How we got here.

A report prepared by the
South Australian Wine
Industry Association.

April 2008

South Australia,

the *heart*
of Australian wine.



Contents.

- 4. Introduction.
- 5. **Section One – Background, purpose and methodology.**
- 7. Background.
- 8. A brand hierarchy.
- 10. Regional branding principles:
- 11. Methodology.
- 13. **Section Two – Findings and recommendations.**
- 15. - Region 1: Adelaide Hills.
- 19. - Region 2: Barossa.
- 23. - Region 3: Clare Valley
- 27. - Region 4: Coonawarra.
- 31. - Region 5: Langhorne Creek.
- 35. - Region 6: McLaren Vale.
- 39. - Region 7: Riverland.
- 42. The South Australian Story.
- 44. Summary.
- 45. Recommendations.
- 46. Hero Images.
- 47. Final remarks and next steps.



Introduction.

The South Australian Wine Industry Association is committed to ensuring that South Australian wine marketing and promotional activities develop and strengthen a brand franchise for South Australian wine in a way that legitimately and relevantly provides differentiation within Wine Brand Australia.

SAWIA, the South Australian Government and many of South Australia's wine regions have a long history of initiating or participating in overseas wine promotions. However, there has not been brand guidelines available to align these efforts or provide guidance on the when, where and how to use regional brands to further develop and elevate the market for South Australian wine.

In September 2006, Clemenger BBDO Adelaide was commissioned by SAWIA to define and describe the brand essence of South Australia's seven most well known wine regions.

Those regions are:

- Adelaide Hills.
- Barossa.
- Clare Valley.
- Coonawarra.
- Langhorne Creek.
- McLaren Vale.
- Riverland.

Working with key stakeholders, the brand essence of each of these these regions has now been developed and agreed.

This report is in two sections:

Section 1: Background, purpose and methodology.

Section 2: Findings and recommendations.

Section One.

BACKGROUND, PURPOSE AND METHODOLOGY.



Background.

When you walk into a good wine retailer, you are confronted with literally hundreds of labels. In fact there are supposedly more than 2,500 different wine brands on offer at any given time, in any given market. Investigate further and you discover different varietals, various price points and packaging.

This degree of choice has become a real issue.

For consumers it is adventure and confusion all at once. Not surprisingly they need a point of reference. And it's this reference point that is really at the heart of this project.

Given the significant volume of wine sales, the industry invests a relatively small amount on mainstream consumer advertising. So while bigger brands like Jacob's Creek, Hardys and Wolf Blass are some of the exceptions, in general, consumers don't receive information on wine brands in a mass media sense.

Instead, opinions on brands are formed from word-of-mouth, tastings, reviews and point of sale: often it can be as subjective as the packaging or as pragmatic as a price point. The looseness of the relationship between wine brands and consumers, the inability of brands to exert direct and controlled influence on consumer choice is the fundamental issue we are trying to address.

But Regional branding doesn't just give consumers a reference point. Regional branding can also become a very powerful quality driver.

The challenge for South Australia is an embarrassment of riches. There is arguably nowhere else in the world that can boast seven world-class wine growing regions showing remarkable diversity of style and character in such close geographic proximity. This is a fact that remains known to few yet a claim that holds great power for the South Australian industry and undeniable interest to wine lovers everywhere.

A brand hierarchy.



Wine Australia's 'Where to Next?' publication released in 2006 rightly makes the point that exports of Australian wine have been spectacularly successful over the past 10 years – especially in the UK, USA and Canada.

Throughout much of the world, Australian wines are now well known and acclaimed.

But in the last few years, other countries have grown exports at a greater rate than that of Australia. As Wine Australia says – “Competitors are on the move and attempting to occupy a similar space to Australia”.

The challenge – and opportunity – is to evolve Wine Brand Australia's brand values and attributes, looking to introduce new elements and features.

Wine Australia has commenced this process and laid the foundations upon which South Australia can build. The refreshed Wine Australia brand message is an assurance of consistently better quality at every price point. Wine Australia communicates the benefits of the brand: accessibility; competitive interest, enjoyment and ultimate wine quality.

To develop this brand message into a simple but effective communication platform, Wine Australia has focussed on four sub-brands or personalities that seek to reflect both the Australian wine product offering and the Australian market opportunity.

Brand Champions are the engine room of the Australian category and the standard bearers for all that follow. Category champions, popular well-known brands, and wineries that aspire to a mainstream presence in either retail or restaurant channels, e.g Jacob's Creek, Hardy's stamp.

Generation Next is all about differentiation through innovation and pushing boundaries in winemaking (new product development and new blends), viticulture and marketing (packaging and communication), e.g. Heartland Dolcetto Lagrein, Pirramimma Wines – low alcohol, Clare Valley screw-cap initiative.

Landmark Australia reflects the Australian fine wine dimension. Using Langton's classification, current show circuit results and informed advice from Australian commentators, these are the wines we all aspire to, e.g. Penfolds Grange, Henschke Hill of Grace.

A brand hierarchy.

Regional Heroes are wineries and/or producers who have blazed a trail for their region's profile with varietal choice and/or style dictated by a distinct sense of place. These are wines from somewhere rather than wines from anywhere, e.g. Rockford, Nepenthe, d'Arenberg.

South Australia and its wine regions now have the opportunity to build on the excellent work that Wine Australia has done. The Regional Heroes personality is the ideal cue by which South Australia can add depth to the Wine Australia story for trade and consumers.

In the established wine drinking countries, consumers have heard of Australian wine and they have a sense of our products. But it's one thing to be open-minded to an Australian product. Beyond this point, a decision needs to be made on what wine to buy and drink. Obviously wine style is fundamental to this choice. So too is the brand and the price and both of these things will combine to influence the purchase.

Around the world, wine has always been linked to its origins and Australia now faces the challenge of adding to this mix a sense of place. Regions are especially important in wine. Indeed, "regional character and the overall image of quality associated with the region of origin can all be of significant benefit to a wine's own proprietary brand image".[†]

It is our view that (setting aside variety and price) the three elements that should combine to form the brand message are the Wine Australia brand, the regional brand and the individual winery brand. The weighting of these three will vary from person to person and product to product. For some, the fact that the wine comes from Australia might be by far the most important consideration; for others, it might be enough that they are familiar with the winery brand and they trust it. But without doubt, the largely untapped opportunity is to enhance the prestige and desirability of the wine through greater awareness and understanding of the qualities and unique characters of our regions.

Over time, as we promote the seven regions, we will also build the story that each of the seven regions are from South Australia – and South Australia is, indeed, the heart of Australian wine. But this will not be a conscious state-branding exercise, rather the audience will form that view from the work done promoting the regions.

This is not to say that in promoting South Australia's regions to a captive trade audience, the composite South Australian story can't be told. Indeed, it should be told. But we will return to this point later in this document.

[†]Wine Australia website. Brands & Icons.

Regional branding principles:

FOR AUSTRALIAN (AND PARTICULARLY SOUTH AUSTRALIAN) WINE.



We have established that a strong brand for the region can play a significant role in consumer (and for that matter trade) choice.

What then are the principles that should guide this effort?

There are many definitions of what a brand is, but the one we like is by New York based architect Anna Klingmann who describes a brand as “anything for which people believe there is no substitute”.

So how is it that we can describe and build non-substitutable meaning for South Australia’s wine regions?

Here are the five principles we believe must apply:

1. The brand story must come out of a truth from the region. It must be provable and defensible. It must come out of the qualities or characteristics that make the region unique.
2. The brand message must have the consensus of the key wine producers from within the region. If they don’t embrace the message, it will have no value.
3. The brand message must be clear and consistent.
4. The wineries within the regions should retain their own individual character and style, but their products and their messages should not be in conflict with the regional brand message.
5. The wineries within the regions should look for opportunities to come together to promote their regional brand, thereby adding further depth and character to the story.

If we can succeed in applying these principles to South Australia’s seven wine regions, we will have created a stronger perception of and predisposition towards South Australia’s wines.

Methodology.

There has been a great deal of good work done by the different wine regions in South Australia in defining, articulating and marketing their unique regional strengths.

However, each region uses different ways of describing their point of difference.

A methodology was therefore developed to enable a consistent approach to capture the brand message for all regions.

The two key components are:

1. A 'brand temple' that captures the essence of the brand.
2. A 'brand assets cube' that summarises into words and images the marketable features of the brand.

Having captured and agreed on the brand temple and cube, the results have been creatively interpreted with one core image and 'statement' to 'describe' the region.

Each of these creative expressions will be different from one another but they will follow a family style so that when they are seen side-by-side, they are obviously all from South Australia.

NB: A note on the images.

In conjunction with the work that was done on this project, photographer Milton Wordley was commissioned to capture images that will 'describe' the brand essence and the secondary words for each region. The regional statements have been refined to complement those images and complete the story.



P12.



Section Two.

FINDINGS AND RECOMMENDATIONS

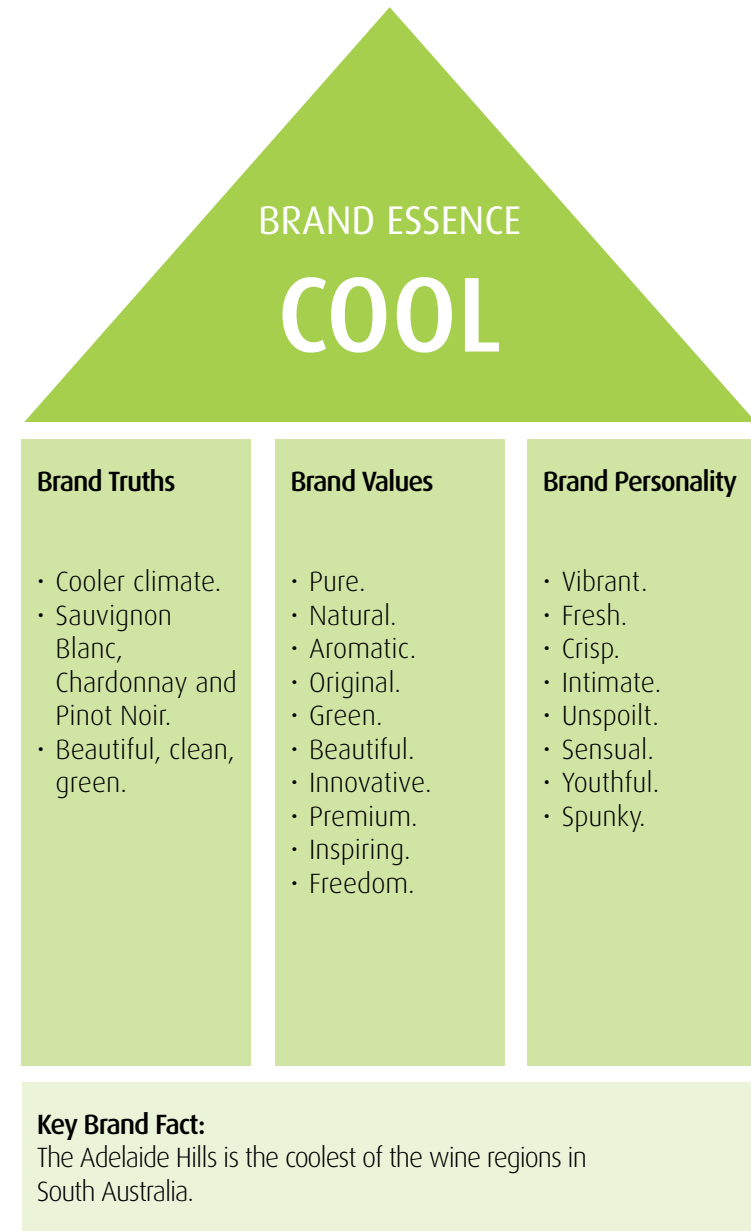
A *cool* green,

beautiful part of South Australia with fresh,
vibrant wines of contemporary character.



Region 1. Adelaide Hills.

BRAND TEMPLE.



Region 1. Adelaide Hills.

BRAND ASSETS.

Vibrant	Beautiful	Green
Pure	COOL	Contemporary
Fresh	Original	Sensual

THE MEANING BEHIND THE WORDS.

Cool: The cooler climate of the Adelaide Hills is what defines the region and dictates its products.

Vibrant: The people; the region; the wines.

Beautiful: Landscape; scenery; blossoms; flowers.

Green: The region; the environment; the birdlife.

Pure: As exemplified in the region's famous Sauvignon Blanc (the colourlessness of the wine).

Fresh: Fresh air; fresh faces; innovation.

Original: Innovative in the vineyard; doing it our way.

Contemporary: Newer, youthful attitude.

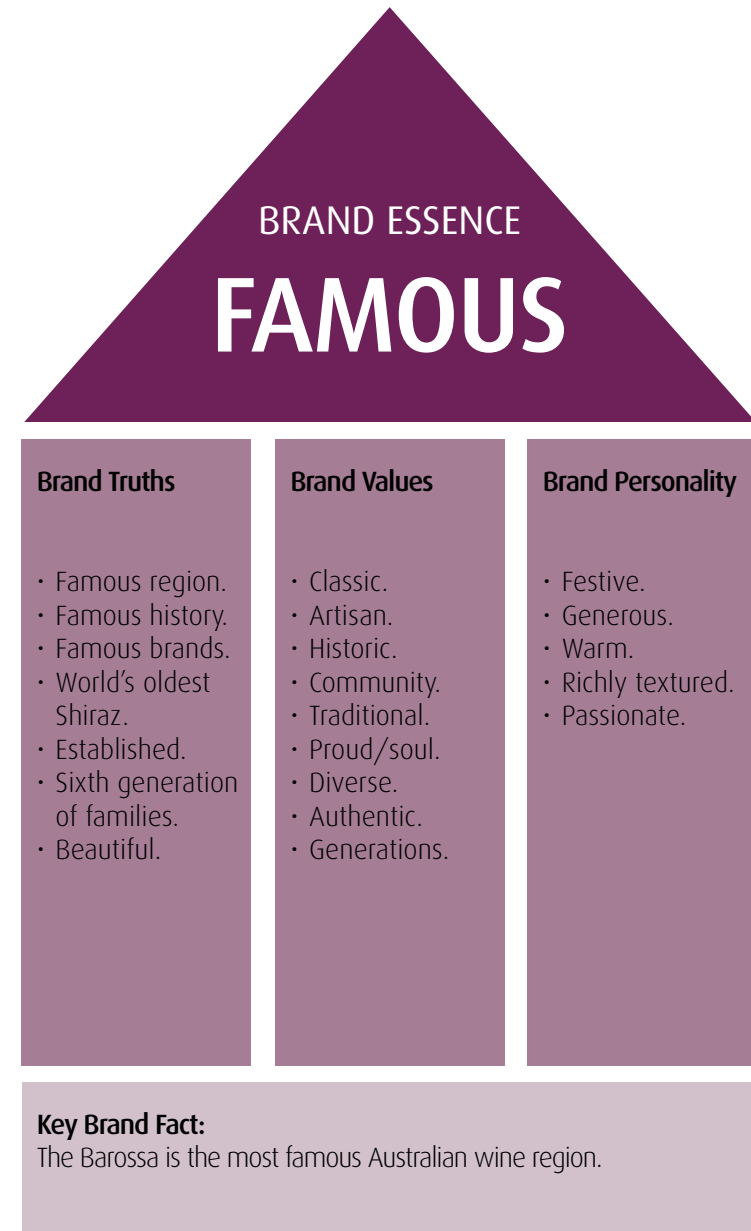
Sensual: The region; the Pinots; the sensual response to the wine.

Australia's most *Famous* wine region,
proud of its history and home of our
nation's most renowned names in wine.



Region 2. Barossa.

BRAND TEMPLE.



Region 2. Barossa.

BRAND ASSETS.

Generations	Warmth	Authentic
Diverse	FAMOUS	Proud
Classic	Festive	Historic



THE MEANING BEHIND THE WORDS.

Famous: Australia's most famous wine region and home of Australia's most famous brands.

Warmth: The feeling you get when you walk into places; the welcome; the warmth; the Mediterranean climate; the generosity of flavour.

Classic: Not following the leaders of fashion; the belief the community has in its wine styles.

Historic: Vineyards; uniqueness of original settlement; Seppeltsfield, Yalumba, Chateau Tanunda; the oldest shiraz vines in the world.

Festive: Sense of fun; enjoyment of life; celebration of life.

Proud: Confidence; perseverance; soul; not walking away when the going gets tough.

Diversity: Of environments and climates; big corporations and small artisans; diversity of people; diversity of landscapes.

Authentic: Having a belief in what you do; the way it is here; authentic winemaking.

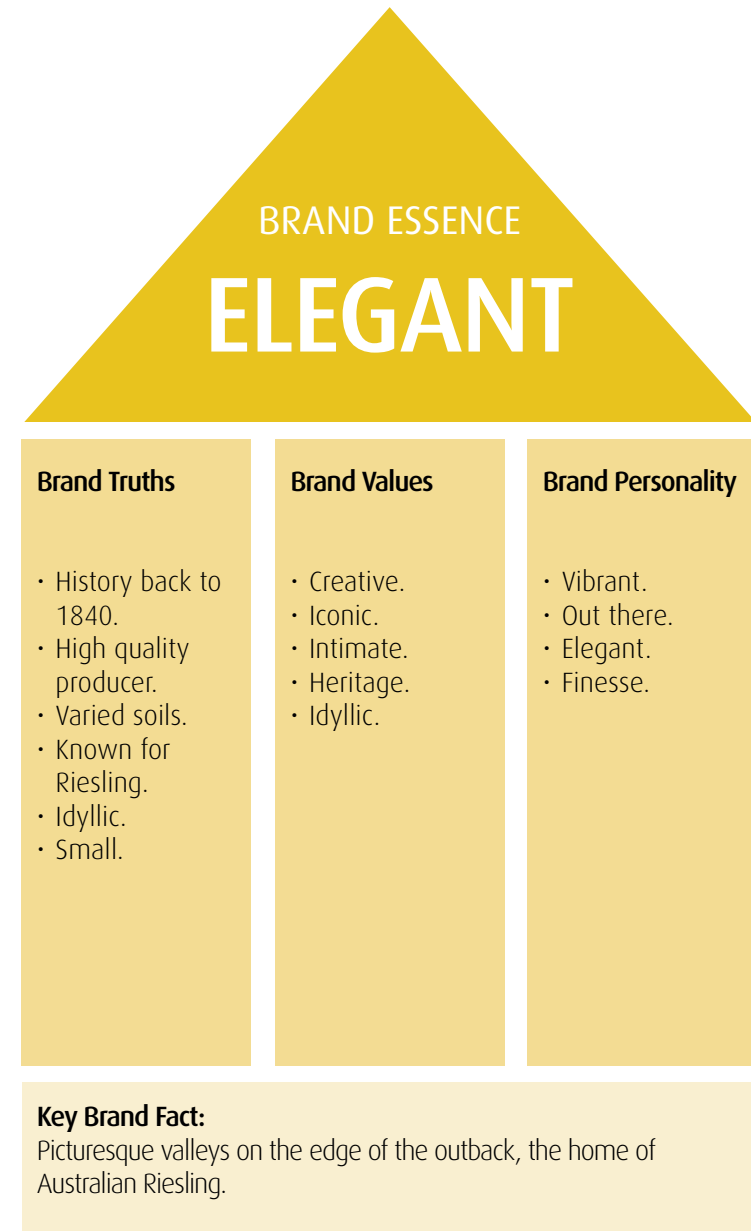
Generations: 500 families growing grapes over generations; unbroken six generations.

An *elegant*
wine region of intimate beauty.



Region 3. Clare Valley.

BRAND TEMPLE.



Region 3. Clare Valley.

BRAND ASSETS.

Unique	Out there	Idyllic
Iconic	ELEGANT	Intimate
Creative	Vibrant	Finesse



THE MEANING BEHIND THE WORDS.

Intimate: Personable; one-on-one; the relationship between people and The Clare Valley; people and the wine; not mass-market.

Unique: Soil structure; dry Riesling at 12% alcohol is unique; elegant; refined; distinctive; has finesse.

Creative: First into screw caps; progressive, innovative.

'Out there': Removed from the city and near the outback; a 'young' term; innovation; doesn't follow the fashion.

Vibrant: Food and Wine Festival; winemakers still at the cellar doors serving; lots of energetic winemakers; climate.

Idyllic: Beautiful series of valleys and hamlets; rolling hills; great climate.

Finesse: It's about the wine; carefully structured, balanced; a small, focussed region.

Iconic: The wine; the concentration on Riesling; significant; different; special.

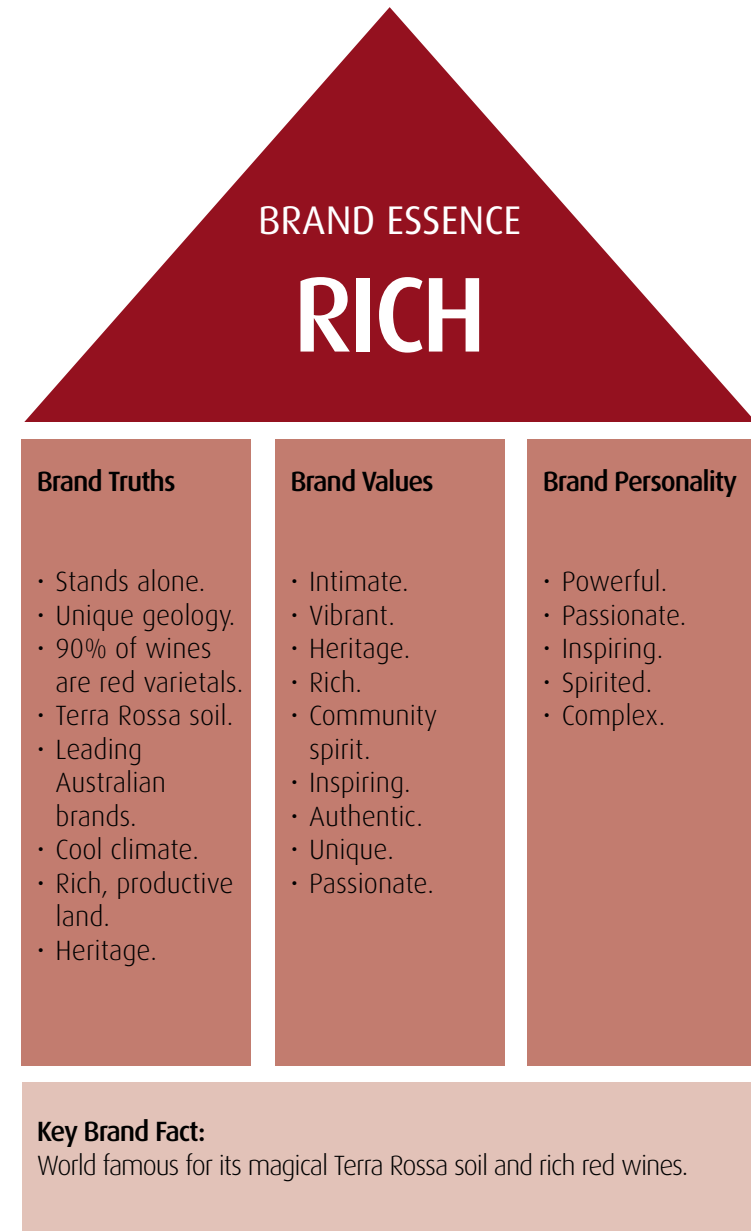
Elegant: Describes the wine style (Riesling); the location (attractive, refined, intimate); romantic; enchanting surroundings; the hills; vineyards; Martindale Hall; buildings in the township.

A place where *rich* and red
defines the soil, the wines and the
passionate winemaking community.



Region 4. Coonawarra.

BRAND TEMPLE.



Region 4. Coonawarra.

BRAND ASSETS.

Inspiring	Community	Incomparable
Passionate	RICH	Red
Traditional	Authentic	Heritage



THE MEANING BEHIND THE WORDS.

Rich: The wines are 'rich', full bodied and flavoursome; rich, fertile soil; strong brands, strong people.

Incomparable: Rare; unique; a flat concentrated wine region, unlike anywhere else in the world; different; beyond comparison; classic.

Inspiring: A place that is totally centred on wine production; the battle with the elements, like frost; the way the winemaking community rallies together; the standard of the wine.

Community: The winemakers getting together on bottle night; closeness of the wine making community; the way they support each other; the sense that when one person wins awards, the whole community wins; there's a collective passion for what they all do; it's a very welcoming place.

Passionate: Focused on the wine industry; they are only there for the wine; concentration of powerful brands.

Traditional: Hand pruning; minimal irrigation; the community has a sense of tradition without being stuck in the past.

Authentic: People really have a go; not too slick; hardworking; real people; simply a great place to grow grapes.

Heritage: Wynns 3 Gables; the railway siding; old vines.

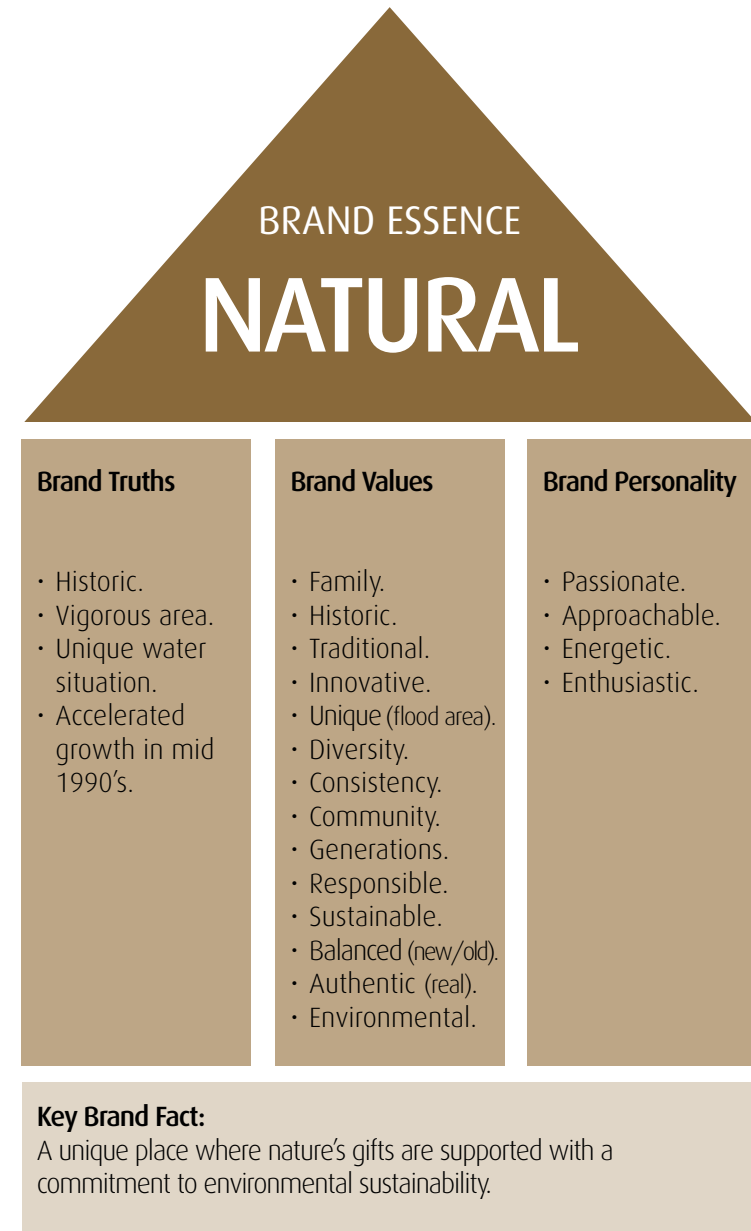
Red: The Terra Rossa soil; the wine; passionate winemakers.

A *natural* environment
where a balanced approach of old and new produces
wines of remarkable quality.



Region 5. Langhorne Creek.

BRAND TEMPLE.



Region 5. Langhorne Creek.

BRAND ASSETS.

Family	Tradition	Innovative
Diverse	NATURAL	Authentic
Consistent	Generous	Balanced



P32. SECTION TWO



THE MEANING BEHIND THE WORDS.

Natural: The unique natural environment; the commitment of the people to sustainability; the natural way that the people are down-to-earth, not pretentious.

Family: Generational; families here over time.

Tradition: Family tradition; tradition of innovation (red gum press); best of old with best of new winemaking practices.

Innovative: Viticultural – water management; canopy management; preservation of underground water.

Diverse: Range of varieties.

Consistent: Quality of the wines, region recognised for its consistency (awards); quality year after year.

Generous: Wine mouth feel; people, to the environment; on your pocket; community.

Balance: Tradition/new ideas; wines very balanced; ying/yang.

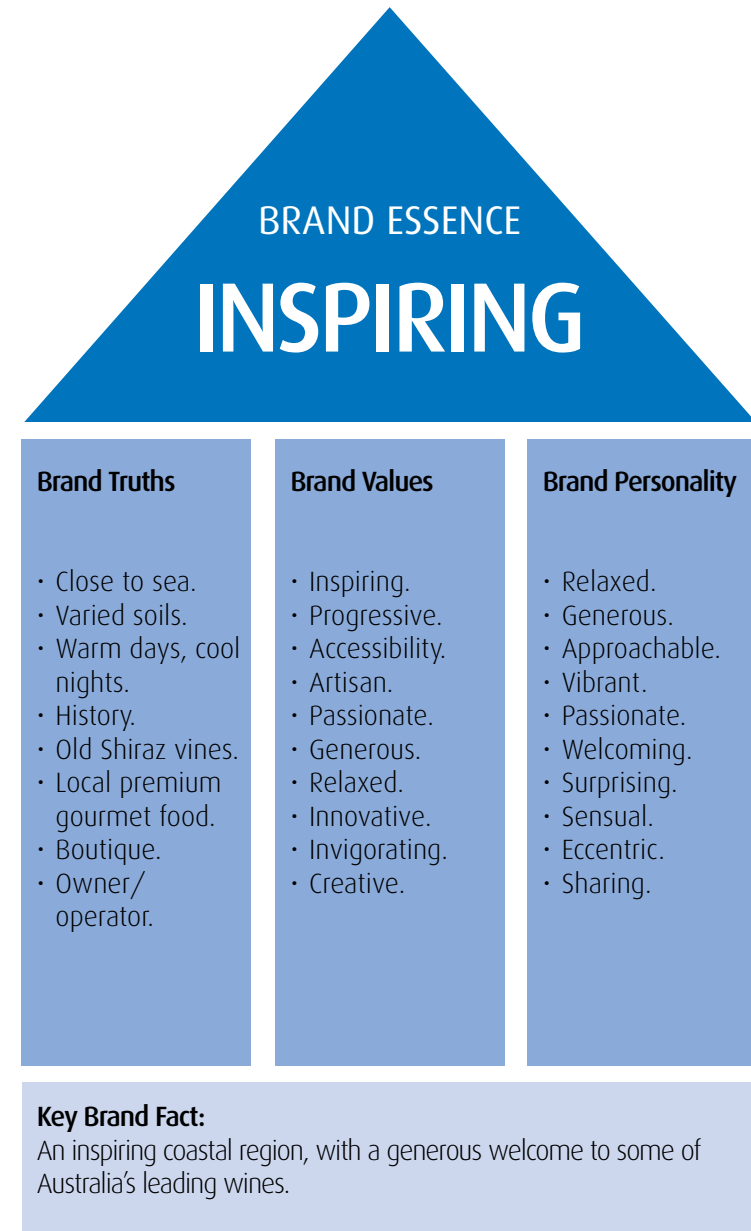
Authentic: No nonsense; what you see is what you get; a real place, real people, not fabricated, “ridgy didge”.

An *inspiring* region
where rolling hillsides lined with vines
are cooled by the spray of the sea's breeze.



Region 6. McLaren Vale.

BRAND TEMPLE.



Region 6. McLaren Vale.

BRAND ASSETS.

Coastal	Leading	Sharing
Passionate	INSPIRING	Vibrant
Generous	Eccentric	Sensual



THE MEANING BEHIND THE WORDS.

Inspiring: The location is inspiring, from Chapel Hills to Sellicks; the brands; the number of grape varieties; the people; their attitudes; an affinity with art.

Sharing: Approachable; not pretentious; open; welcoming.

Generous: Full flavoured wines; sharing of ideas; helping one another, sharing.

Eccentric: Artisan winemakers who have a degree of eccentricity in style or personality; interesting diverse community.

Sensual: Warm, coastal weather; soft, rolling countryside.

Passionate: Winemakers/people are passionate about their work; the success that McLaren Vale has achieved; the community revolves around the industry; they celebrate it with Sea & Vines, art, etc.

Vibrant: Thriving; bustling community; strong winemaking culture; strong momentum over the last eight to ten years.

Diverse: The other word was varied; small parcels of land that each make unique wines; diversity of soils and geography.

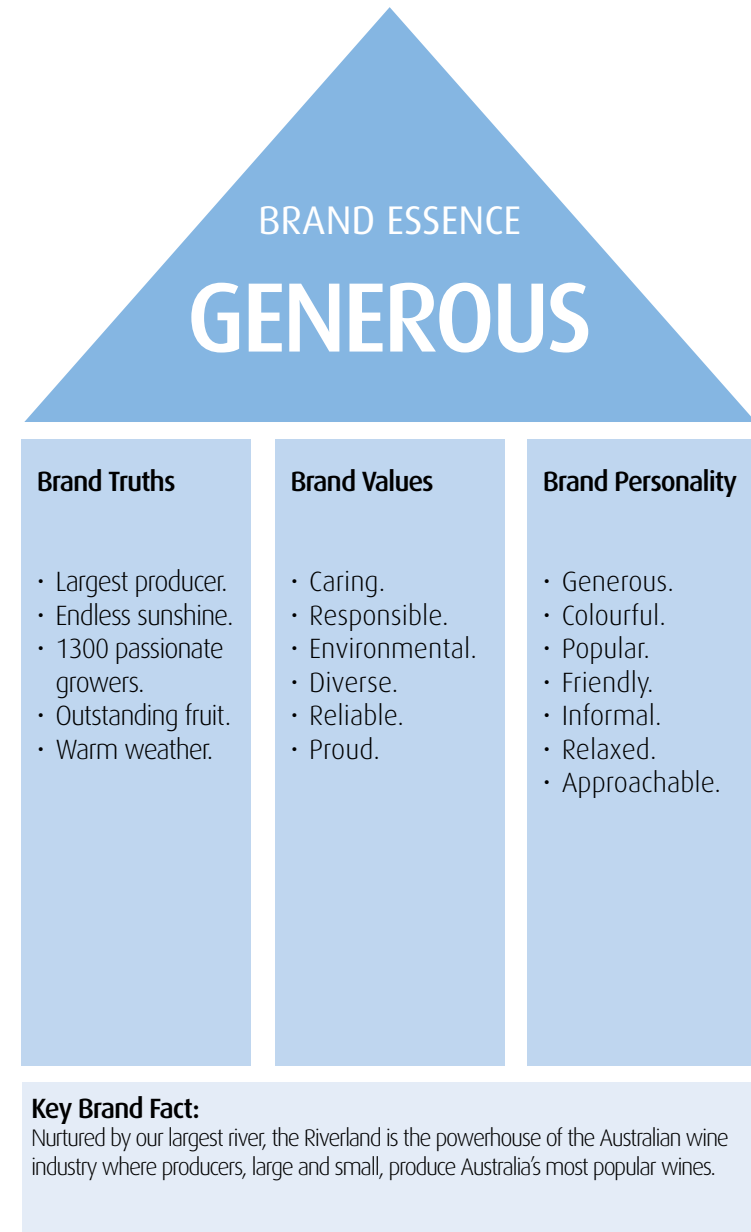
Coastal: Unique location from the Hills to Sellicks.

A *generous* landscape, warmed by
sunshine and nurtured by the river, produces
grapes for Australia's most popular wines.



Region 7. Riverland.

BRAND TEMPLE.



Region 7. Riverland.

BRAND ASSETS.

River	Sunshine	Popular
Relaxed	GENEROUS	Friendly
Environmental	Warm	Colourful



THE MEANING BEHIND THE WORDS.

Warm: Of the people from diverse cultural backgrounds; laughter; climate – 9 months of the year warm to hot, 3 months cool, cold doesn't really exist.

Environmental: Wetlands and wildlife.

Friendly: Informal; outdoor; alfresco; fun.

Popular: Australia's most popular wines are made from Riverland fruit.

Generous: Generous wine flavour; generous people; generous production - the largest region in Australia.

Sunshine: More sunshine, bigger skies.

Colourful: Changing colours of landscape; colour in the wine; colourful characters/cultures.

Relaxed: People relax in the Riverland; Riverland people are relaxed, more modest; not snobby or elite; the atmosphere; the attitude.

River: the dominant feature of the landscape; the life source around which the region revolves.

The South Australian Story.



Wine Australia's positioning statement is 'there's a world of difference in Australian wines.'

These differences are powerfully and persuasively brought to life in this summary of South Australia's seven regions.

And together, the seven regions make up the South Australian wine story.

We have made the point in this presentation that the opportunity exists to develop awareness and meaning for South Australia's individual wine regions.

A greater understanding of the regions will lead to a stronger predisposition towards a brand that comes from this region.

But there will be times, particularly when talking to the trade, where it makes sense to introduce South Australia and set the scene for the story of our regions.

And so just as we have advocated that the regional brands must tell their story in a clear and consistent way, so too is it important that the South Australian story is told clearly and consistently.

We believe the South Australian story begins with the following brand claim:

South Australia. The heart of Australian Wine.

The following facts make this claim undeniable:

- Over half of Australia's great wines as classified by Langton's come from South Australia.
- South Australia has over representation of wine regions that have the strongest market awareness and quality reputations, eg. Barossa, Coonawarra, McLaren Vale, Clare Valley.
- The dominant share of national grape and wine production is in South Australia.
- The major wine corporations have their production bases in South Australia.

- South Australia has both easily affordable and high priced wines, both warm and cool climates and commercial and boutique brands, providing diversity of style and character in every category.
- The national wine industry organisations, education and R&D institutions have their headquarters in South Australia, providing leadership in winemaking and viticulture intellect and expertise.
- South Australian wine is exported to over 100 countries, with the major markets being UK, USA, Canada and New Zealand.
- The South Australian share of Australian wine exports has averaged 60% over recent years.

WINE AUSTRALIA: There's a world of difference in Australian wines.

Adelaide Hills - Cool

Barossa - Famous

Clare Valley - Elegant

Coonawarra - Rich

Langhorne Creek - Natural

McLaren Vale - Inspiring

Riverland - Generous

South Australia.
The heart of the Australian wine with a brilliant
blend of stunning wine regions.

Summary.

The recommendations in this report will amount to nothing unless they can be applied consistently by the various stakeholders and brand advocates promoting in the marketplace. Determining what those markets are and how much should be invested to promote the collective regions of South Australia is beyond the terms of reference for this report.

However, all branding applications require a sustained effort over a number of years to succeed. It is no different for successful regional branding.

The purpose of this project has been to provide the industry with the elements that are essential to promote South Australia's regions in a strategic and systematic manner that also strengthens and differentiates Wine Australia.





Recommendations.

1. That South Australia's regional branding is endorsed by all stakeholders who agree to apply the branding in a consistent and sustained manner.
2. That guidelines for the use of all words and images for all regions are developed.
3. That the following materials should be developed for general use by all stakeholders:
 - a. Guidelines for the use of "hero" and supporting images can be found in the Style Guide.
 - b. A wine brochure showcasing South Australia's regional heroes - each of the seven regions.
 - c. A corresponding South Australian wine presentation for use with trade/media and at associated presentations.
 - d. Supporting materials that can be used for gifts and promotions.

In addition to the above, materials tailored to specific markets and audiences will be required. Whilst the core message and images will not change, the materials used in a developing market like Korea are likely to be different to those used in a well established market like UK.

Further recommendations will be made once these markets have been identified.

Hero Images.

A core image and statement has been developed as the central creative expression of each region.

As already mentioned, a photographer was commissioned to capture one hero and multiple secondary images for each of the seven regions based on the brand essence of each region.



Final remarks and next steps.

This project provides a unique opportunity for South Australia to build recognition and reputation in the higher margin/higher price point segments so important to regional winemakers. And in so doing, to align closely with Wine Australia as the industry takes on the challenges wrought by the dynamics of the global market for wine.

An absolute necessity for success is the wholehearted commitment of all stakeholders to the regional brands, an agreed plan for the way forward and the resources to make it all happen.



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